

## Department of Revenue

### GOAL: Improve Citizen Service to More Effectively Administer the Department's Statutory Requirements

#### OBJECTIVE: Improve citizen interaction

Strategy	Initiative	Division	Measure
Provide accurate and timely information that is easy to access	Mail assessment notices to all property owners every two years per statute	Property Assessment	100% of notices mailed by statutorily required deadline
	Improve written communications with citizens	Business & Income Taxes	Review all department letters on every two-year basis
	Respond to cannabis licensee inquiries timely	Cannabis Control	Respond to all licensee contacts within two business days
Provide clear guidance to support Montanans' understanding of their obligations	Update the division's webpage with necessary resources including Enterprise Fund reports, fact sheets and maps	Alcoholic Beverage Control	Ongoing/Continuous
	Update the division's webpage with necessary resources including the Taxpayer Valuation, Agricultural and Forest Land manuals and the Reappraisal Plan	Property Assessment	Ongoing/Continuous
	Update the division's webpage with current information related to taxes	Business & Income Taxes	Ongoing/Continuous
	Provide taxpayer outreach by presenting at ABC clinics, webinars & tax forums	Business & Income Taxes	Complete 10 outreach activities per year
	Create an education video regarding filing requirements	Business & Income Taxes	Completed by December 31, 2023
	Meet with production companies at the beginning of their setup process to improve accuracy of MEDIA credit applications	Business & Income Taxes	Meet with 100% of production companies
	Update the division's webpage with necessary resources including tutorials for worker training and packaging and labeling submissions	Cannabis Control	Ongoing/Continuous
	Update the Livestock Per Capita Fee Webpage	Information Management & Collections	Annually
	Create a collections services webpage	Information Management & Collections	Completed by June 30, 2024
	Update the TransAction Portal webpage with general taxpayer self-help resources	Information Management & Collections	Completed by June 30, 2024
Administer efficient services to increase compliance with reporting and filing taxes while reducing gaps	Host statewide town hall meetings & publish PSA's after property assessment notices	Property Assessment	Completed during May-June, 2023
	Track the number of cases the Taxpayer Assistance Office has resolved	Director's Office	Total resolved cases per year
	Develop an online filing application for property exemption requests	Property Assessment	Completed by January 1, 2024
	Open 2 additional county offices within the next two years	Property Assessment	Opened by December 31, 2024
	Increase e-filing of tax returns by 1000	Business & Income Taxes	1000 more 2022 efiled returns by end of filing season

#### OBJECTIVE: Accurate valuation of property

Strategy	Initiative		
Ensure all property in the state is valued at market value and valuation is completed by the statutory deadlines	Appraisals of all residential, commercial, industrial, and agricultural/forest land properties in Montana are completed by the statutory deadline	Property Assessment	Completed by May 1, 2023
	Central Assessed property appraisals completed by Department deadline	Business & Income Taxes	Completed by June 1 annually
	Provide accurate and timely certified taxable values to all taxing jurisdictions	Property Assessment	Provided to counties no later than the first Monday in August

#### OBJECTIVE: Alcoholic beverage control regulation/efficiency

Strategy	Initiative		
Administer alcoholic beverages regulations equitably and efficiently to promote public health and safety	Pursue efforts to streamline licensee approval processes through collaboration with Department of Justice	Alcoholic Beverage Control	Legislation passes and reduction in time it takes to process licenses
Administer the distribution of alcoholic beverages efficiently	Liquor ware house expansion to improve the efficient operation of the warehouse	Alcoholic Beverage Control	Increased number of cases that are distributed timely and accurately

#### OBJECTIVE: Efficient processing of data and revenue

Strategy	Initiative		
Process data and revenue accurately and timely	Timely processing of paper returns	Information Management & Collections	Open paper returns within 5 days of receipt
	Timely processing of tax refunds	Information Management & Collections	All timely filed paper return refunds are processed within 45 days of due date
	Timely processing of money	Information Management & Collections	All money is processed within 2 days of receipt
	Implement payroll software vendor approval table	Information Management & Collections	Prior to 12/31

OBJECTIVE: Develop electronic filing and payment services			
Strategy	Initiative		
Increase and enhance electronic filing and payment services	Increase efilng of individual income tax returns by 1000	Business & Income Taxes	1000 more 2022 efiled returns by end of filing season
	Make water's edge election available through the TransAction Portal	Business & Income Taxes	Completed by December 31, 2022
	Make situs and mileage reporting available through the TransAction Portal	Business & Income Taxes	Completed by December 16, 2022
	Increase the use of the Federal/State Employment Taxes Application Program	Information Management & Collections	Track the number of enhanced or added services in the biennium and users on board
	Enhance user experience on the TransAction Portal	Information Management & Collections	Measure number of enhancements/user experience surveys
OBJECTIVE: Equitable collection practices			
Strategy	Initiative		
Administer collection practices that foster equity and uniformity	Increase the number of collection cases resolved in under 6 months	Information Management & Collections	5% in fiscal year 2023
	Increase efficiencies in resolving delinquent collection account	Information Management & Collections	Create electronic methods for financial institutions and employers to remit levy responses and payments
	Develop new payment plan options to allow for a single payment agreement for multiple tax types	Information Management & Collections	Decrease in number of payment plans required for a single citizen with multiple delinquent accounts/increase in payment plan activation percentages/increase in percentage of resolved delinquent accounts
OBJECTIVE: Secure confidential information			
Strategy	Initiative		
Protect confidential and privileged materials	Annual disclosure awareness and security awareness trainings	Technology Services/All Divisions	100% employee completion
	Annual signing of confidentiality and disclosure of information form	Technology Services/All Divisions	100% employee completion
	Dual approval on all security access and audit access regularly	Technology Services/All Divisions	100% reporting
	Monitor all systems and perform vulnerability scans	Technology Services/All Divisions	Weekly
OBJECTIVE: Provide a simple and seamless process for business registration and licensing through the eStop P.			
Strategy	Initiative		
Modernize eStop Program	Seek to replace current antiquated software	Director's Office	Working with SITSD to acquire best solution for system
OBJECTIVE: Hire and retain qualified and competent employees			
Strategy	Initiative		
Train, guide, and empower employees	Town hall meeting with all staff	Director's Office/All Divisions	Quarterly
	Implement formal professional development processes	Director's Office/All Divisions	July 2023
Hire and retain competent employees	All managers meeting-yearly	Director's Office/All Divisions	October 2023
	Revamp job postings	Director's Office/All Divisions	March 2023
	Attend job fairs	Director's Office/All Divisions	3 per year
	Create "day in the life of videos"-interviews with staff	Director's Office/All Divisions	4
	Offer telework opportunities	Director's Office/All Divisions	Update all job postings by March 2023 to include telework availability language
	Implement career ladders	Director's Office/All Divisions	Create career ladders for all appropriate positions by July 1, 2023
	Executive leadership personal welcome of all new staff on first day of work	Director's Office	100%